

ClearSync To Outlook

User Documentation

Introduction

Please see the [ClearSync To Outlook](http://clearsync.zendesk.com) topic at the ClearSync Support site (<<http://clearsync.zendesk.com>>) for the most current information about the application, its release history and usage notes.

What ClearSync To Outlook Does

The *ClearSync*[®] *To Outlook* sync utility is a Java-based application that establishes a “bridged” correspondence between events in a one or more designated Microsoft[®] Outlook[®] calendars and corresponding ClearSync[®] calendars.

This connection can be configured so that – with a few rare exceptions as noted below – the initial sync places all the Outlook events on the ClearSync calendars –or– all the ClearSync events get placed on the Outlook calendars –or– the events on both calendars in a linked (bridged) pair get added to each other. Subsequent changes to events on one side will then be automatically synced between the calendars, at whatever interval and in accordance with any sync direction options you select.

Requirements

- ClearSync License: Gold, Silver, Outlook, or Free Trial (Gold equivalent)
- Windows version: Windows XP, Vista, Windows 7
- Java version: Java 5 or above (v1.5x)
- Outlook version: 2003, 2007, 2008, 2010

Updates & Future Features

- The application has a software auto-update feature that triggers whenever a <Sync to Server> occurs after a new version has been posted. Users are given the option of accepting the update or not.
- Support for syncing *Contact Categories* will be added in a future version.

Installation and Use of ClearSync To Outlook

*** Important Installation Notes ***

1. Download and run the ClearSync To Outlook Installer

- Go to <http://view.clearsync.com/bridge/outlook/bin/ClearSyncToOutlook.exe>, save the <ClearSyncToOutlook.exe> file to your computer and then run it.
 - We strongly recommend saving the file to your local hard drive and running it from there rather than directly via your Internet connection.

2. Launch the ClearSync To Outlook application

- Enter your ClearSync *Username* and *Password* when prompted.

3. Create a Bridge - Select Calendars to Sync

- A. Select a ClearSync calendar or create a new one to sync to Outlook
- B. Select an Outlook calendar to bridge to ClearSync

*** Important ***

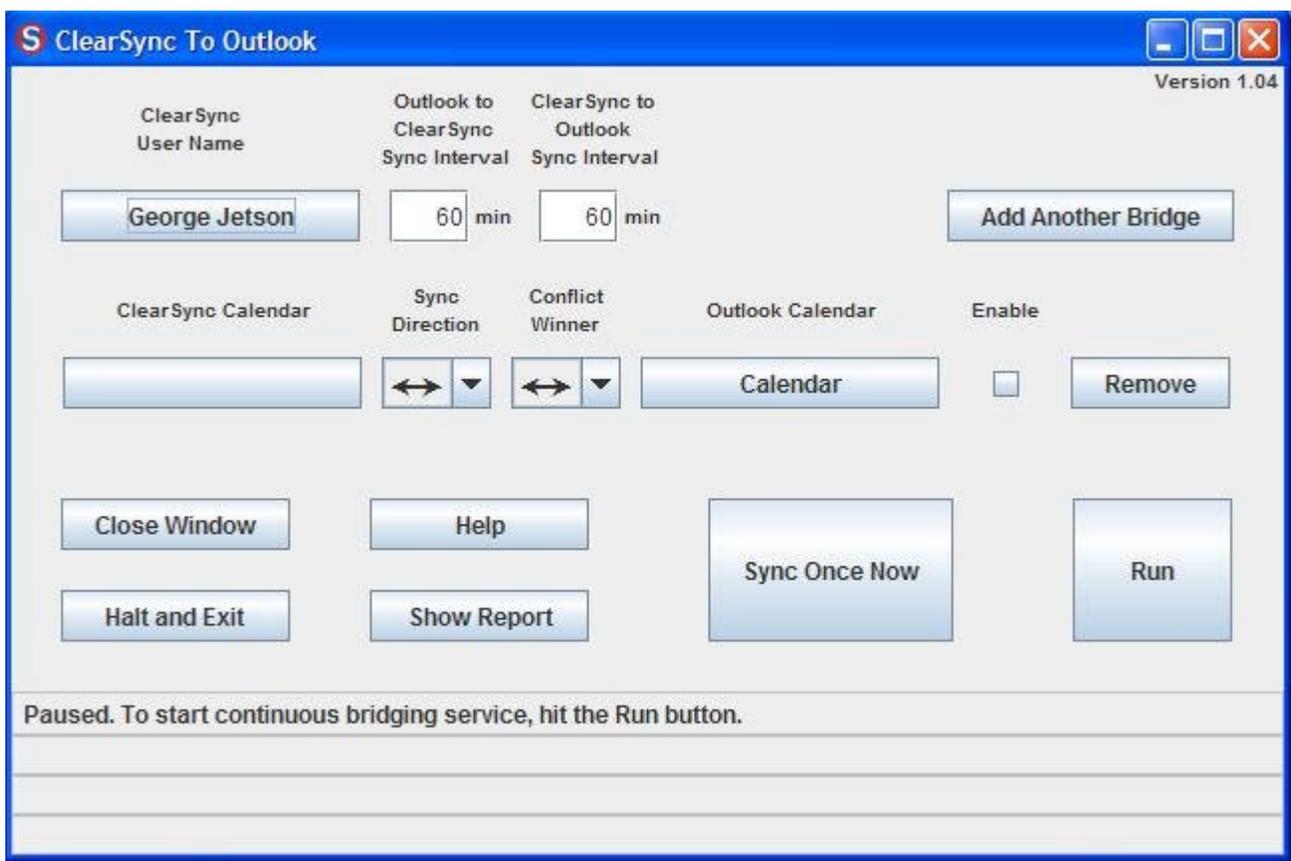
- *Start with one Sync Bridge*

We recommend that first time users start with just one pair of calendars – adding additional calendar bridges can be easily done once you are comfortable with the utility’s operation and performance.

- Performance Considerations**
 Please be patient with how long the first sync might take to complete – syncing calendars with many thousands of events may run for many minutes or perhaps even one+ hour.
 - You can use the *Calendar Manager* in your ClearSync calendar application to see the number of events in each calendar.
 - You can see the number of events in an Outlook calendar by right-clicking it to open the <Properties> dialog, select <Show total number of items> and click <OK>.
- Calendar Permissions**
 ClearSync *Subscribed Read Only* calendars can be synced to Outlook, however any changes made in Outlook to these calendars will not sync back to ClearSync. Further, though these changes will be retained in Outlook, any subsequent changes made by the calendar owner to events previously modified in Outlook will be replaced by the updated ClearSync version.

4. *Configure ClearSync To Outlook*

The *ClearSync To Outlook* dashboard will appear after you have selected the ClearSync and Outlook calendars you wish to sync with one another.





Select Your ClearSync Calendar



Below is a list of calendars from your ClearSync account. Select the one you would like to synchronize with Outlook and click OK. Or create a new ClearSync calendar.

New ClearSync Calendar Name:

New

OK

Cancel

- A. **ClearSync Account & Calendars:** The ClearSync Account *Username* and the ClearSync and Outlook calendars you have selected can be changed at any time. Note that new ClearSync users who have not yet run & synced the *ClearSync 2 Desktop*, PC browser-based *ClearSync 2 Viewer*, or *ClearSync for Android* application will likely not have any of CS calendars established yet. If so, you can create as many new calendars as needed via the “Select Your ClearSync Calendar” dialog.
- B. **Add Another Bridge:** You can add as many bridged pairs of calendars as you wish at any time. The <Enable> box can be checked / un-checked for each *Bridge* to control which calendar pairs get synced.
- C. **Sync Intervals:** The default autosync interval is 15 minutes and can be increased to whatever length you wish; the shortest possible interval is 5 minutes. An autosync interval is defined as the number of minutes from the end of the last sync to the beginning of the new sync.

Note that shorter sync intervals require more CPU resources and may affect the performance of the computer system and/or not just the *ClearSync To Outlook* utility but possibly other apps you may be running. While setting longer sync intervals are likely only a concern if you wish to have updates made frequently with people you share your calendar with through either the ClearSync Server or a Microsoft Exchange Server, you can always <Sync Once Now> if you don't want to wait for the next autosync to trigger (doing so does require click <Run> to restart the autosync timer).

- D. **Sync Direction:** The default is for a bi-directional sync but you can establish a one-way sync to always occur in either direction, <Outlook to ClearSync> or <ClearSync to Outlook>. Note that the <Conflict Winner> selection will automatically adjust when either one-way sync option is selected. However, it does need to be reset manually to the default “mutual” conflict resolution if you change the Sync Direction back to bi-directional.
- E. **Conflict Winner:** Conflicts occur when an event has been edited independently in both ClearSync and Outlook since the last sync. The question is: which edited version of the event edit should “win” and be retained in both applications and which gets discarded. Though this is a relatively rare occurrence, it can happen, especially if you are working with others who have “read / write” access to your calendar. You can choose which calendar you would view as more authoritative, either ClearSync or Outlook. Or if you want to be careful, you can have both edited versions kept for later review and subsequent adjustment, deleting one of the 2 events and saving the corrected version.

5. *Show Report*

Before you sync for the first time, we recommend viewing the *Report* to see a list of current incompatibilities between how ClearSync and Outlook handle certain types of events (especially recurring events). After syncing, the *Report* summarizes the sync operations and any conflicts or errors that might occur. You may wish to check the *Report* periodically to see, for example, if there have been any Outlook events that could not be rendered in ClearSync as you might expect, or at all – and vice versa.

6. *Begin Syncing*

Now you are set up and ready to turn on syncing. You have a couple choices:

A. First Sync

- We recommend doing a <Sync Once Now> so you can see how the program operates and watch as your data is synced into ClearSync from Outlook, and vice versa if the ClearSync calendar you have selected also has data in it.
- If you have a large calendar, please be patient while *ClearSync To Outlook* processes all the data and syncs it to your Account on the ClearSync Server. While there are many factors that can effect *Bridge* and sync performance – which can vary not only from one system configuration to another, but also upon how the

computer is being used at any particular point in time – , as a general guide, you can expect the first sync of an 1000 event calendar to take approximately 5 minutes to complete and a 6K calendar about 30 minutes.

- B. Clicking <Run> will generate the first sync and then, when this sync is complete, the autosync timer begins and the next sync will trigger according to the current *Sync Interval*.

Note: The <Outlook to ClearSync> sync always executes first, followed by the <ClearSync to Outlook> sync.

7. *Running in the Background*

Minimizing the *ClearSync To Outlook* dashboard window or clicking <Minimize Window> to minimize the utility to the Windows tray allows *the utility* to operate in the background. To bring the dashboard back up, double-click the ClearSync logo icon in the tray.

Important: Closing *ClearSync To Outlook*, via either <Halt and Exit> or by clicking the <X> in the upper right corner of the dashboard window, will cause autosyncing to cease operation.



8. *Syncing from Multiple Computers*

If you wish to install *ClearSync to Outlook* on multiple computers to sync from separate Outlook calendars on them to your ClearSync Account, the <BridgeSQL.db> file generated after the very first sync you ever do needs to be copied to the <ClearSync To Outlook> folder on these other systems in order to avoid possible duplication of events. See the **Data Files** section at the end of this document for additional information about this file and where to find it.

Outlook Events that ClearSync Does Not Sync

ClearSync and Outlook handle event data somewhat differently. The *ClearSync To Outlook* utility keeps a correspondence table that tracks the events which correspond to one another in ClearSync and Outlook. Because of the differences between ClearSync and Outlook, there are a few typically rare Outlook events that cannot be currently represented in ClearSync. We plan on resolving these incompatibilities over time and welcome your feedback about which are most important for you.

Current Incompatibilities

- Outlook appointments that span multiple days with different *Start* and *End Times* will be broken into separate events when synced into ClearSync. For example, an appointment that goes from Friday at 7:00 pm until Saturday at 2:00 pm will result in 2 ClearSync events, one on Friday from 7:00 pm to 11:55 pm and one on Saturday from 12:00 am to 2:00 pm; if this spanned appointment goes instead to 2:00 pm Sunday, the ClearSync Saturday event will be 12:00 am to 11:55 pm.
- Monthly repeating Outlook appointments by weekday of Type <Day>. For example, a meeting that is the first weekday of the month.
- Monthly repeating Outlook appointments by weekday of Type <Weekday>.
- Monthly repeating Outlook appointments by weekday of Type <Weekend Day>.
- Yearly repeating Outlook appointments by nth weekday of Type <Month>.
- ClearSync yearly repeating events that have a repeat interval of more than 1 year.

ClearSync To Outlook Files

Installation

Installer

The CSTO Installer filename is:

ClearSyncToOutlook.exe

Program Files

Unless selected otherwise during the installation process, the program files get installed by default in the following folder:

C:\Program Files\ClearSync To Outlook

The files are:

BrowserLancer2-10.jar
ClearSync To Outlook.ico
ClearSync To Outlook.jar
ClearSync-sync-client.jar
Joc-v3.0.2-basic.jar
Log4j-1.2.15.jar
moyocore.dll
moyocore.jar
moyocore_x64.dll
secman64.dll
secman.dll
sqlitejdbc-v054.jar
Uninstall.exe
xercesImpl.jar
xml-apis.jar.

Data

As CSTO runs, it creates files under a <ClearSync To Outlook> folder in the following location:

Windows XP:	<i>C:\Documents and Settings\<Windows_username>\Application Data\ClearSync To Outlook</i>
Windows Vista & 7:	<i>C:\Users\<Windows_username>\Appdata\Roaming\ClearSync To Outlook</i>

The data files stored in this folder are:

Preferences.txt

A text file containing CSTO's user specified configuration settings.

- *Deleting this file* will prompt the user to re-enter the ClearSync Account Username & Password the next time CSTO is launched and all the utility's options will need to be re-set.

BridgeSQL.db

This is the SQL database containing the correspondences between the ClearSync and Outlook data.

- *Deleting this file* causes the correspondence to be permanently lost. Running and syncing *ClearSync To Outlook* after this file has deleted will cause a first-time de-duplication test to be run, slowing down the sync. The correspondence database will then be rebuilt from scratch.
- *If you wish to move ClearSync To Outlook to another computer*, copy this file to that PC in order to avoid any duplications.

CSUsername.xml

This text file contains a representation of the local copy of all ClearSync data for the associated ClearSync <UserName>.

- *If you add another ClearSync Account*, a separate <xml> file will be created – each file is retained for when the CSTO connection is switched between Accounts.

CSUsername.xml.lock

This file “locks down” the primary <xml> data file, preventing more than one *CSTO* session from being launched and protecting the <xml> data file from being deleted while the utility is operating.

- *This file exists only* when *CSTO* is running or if *CSTO* has been exited abnormally (i.e. the app has crashed, the computer loses power or is rebooted while the app is still running, or the user “kills” the app or it’s process via the Windows Task Manager).
- *If the utility crashes*, the lock file will remain but the system can determine that the process that created it is no longer running and will allow *CSTO* to be restarted. It does not matter if this file is left in place or is deleted.

Log Files

CSTO creates the following log files:

BridgeError.log

This text file contains error data for the last time *CSTO* crashed and is stored in the *CSTO* data folder (see above).

- *If CSTO has never crashed, this file will not exist.* Upon a crash, *CSTO* writes the error data into this file and then instructs the user to contact ClearSync Support – sending this file will help us figure out what went wrong.

ClearSync To Outlook.log

This file is stored in the Local Settings “Temp” directory as follows:

Windows XP:	C:\Documents and Settings\<<Windows_username>\ Local Settings\Temp
Windows Vista & 7:	C:\Users\<<Windows_username>\AppData\Local\Temp

- *When the file’s current 200 MB maximum size is reached, it is renamed with an “1” at the end of the filename and a new blank file with the original name is then created, with log information being written from where the first file left off.* Thus, at maximum, 400 MB could be used up on the disk by the 2 files combined.
- *Log information about any problems encountered will generally be captured on the last page or so of the file.*